

How to email Payroll Statements

*** Prior to beginning payroll, you must first enter email addresses for all employees that wish to have their statements emailed to them. These addresses should be entered into the Vendor file under the **“Other Info”** tab. ***

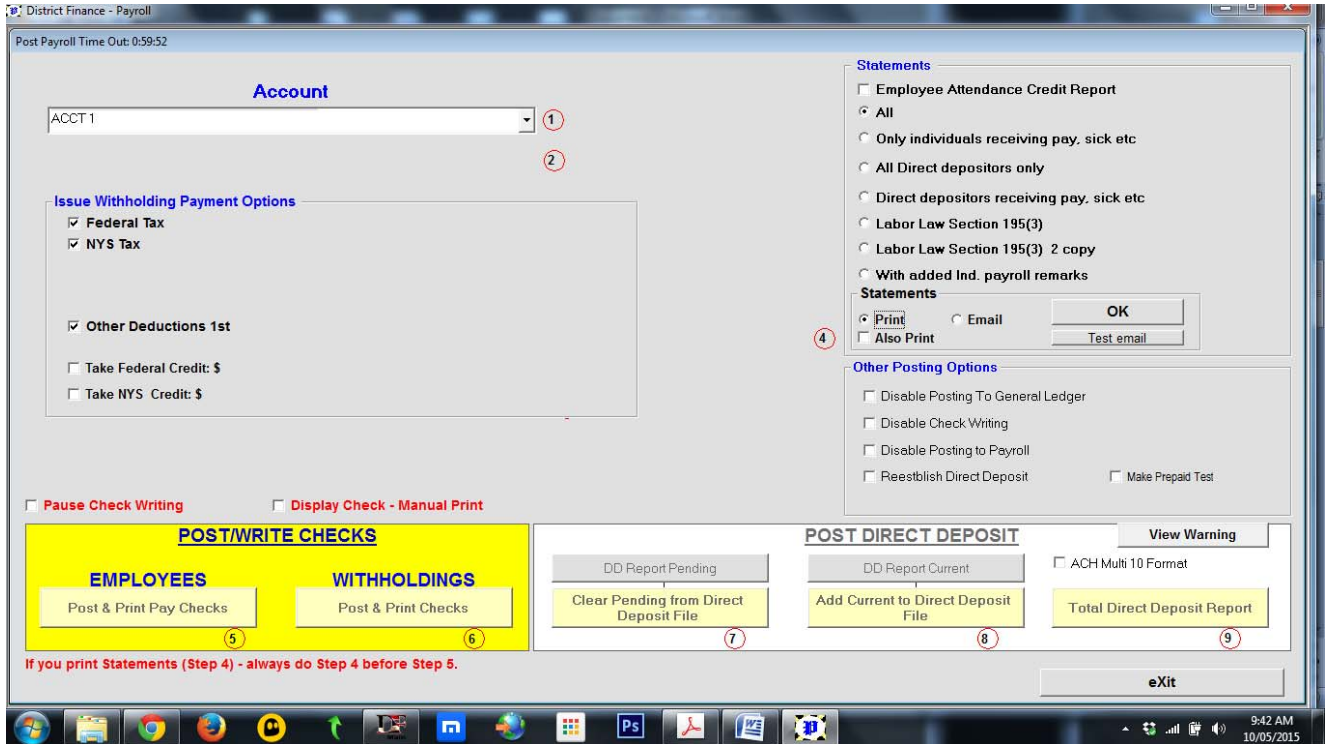
*** This document will only cover the setting up and emailing of statements during the **Payroll Posting** stage; if you are unfamiliar with the **“Do Payroll”** menu, please see our **“How to do Payroll”** guide. ***

Setting up/Testing:

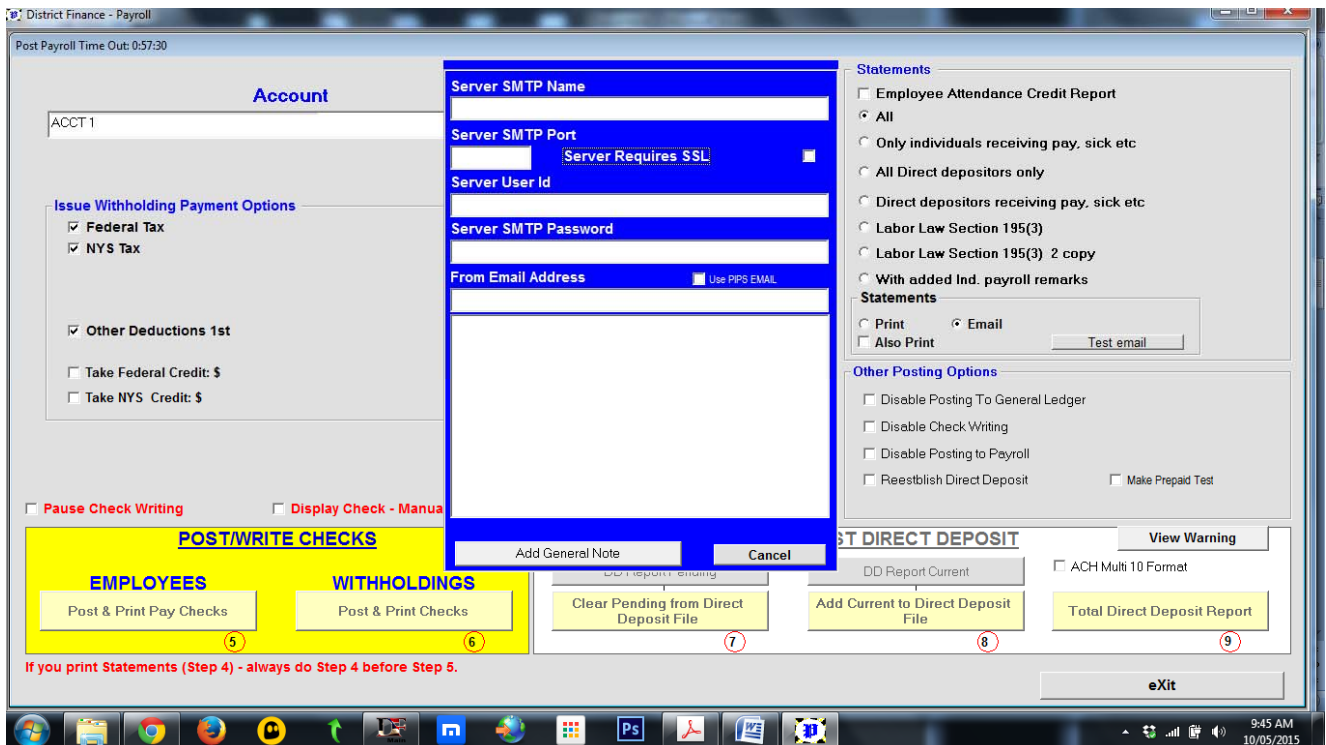
- 01.** Log onto District Finance.
- 02.** Click on the **Payroll** tab.
- 03.** Click on the **Load Payroll Menu** button. The following menu will appear as seen below:



- 04.** Click on the **Test Post Pay Email** button. The **Post Payroll** menu will appear as seen below:



05. The default setting for Statements is "Print" (as seen in the above image); click on the **Email** option and the following menu will appear:



*** Please note that the fields in the above menu are blank; once information is entered, District Finance will remember those settings. ***

06. In the **Server SMTP Name** field, enter your email server. Common email account servers:

- a. GMail – smtp.gmail.com
- b. OptOnline – mail.optonline.net
- c. Yahoo – smtp.mail.yahoo.com

*** Please note that if you use a different email account, you can search online for your settings. ***

07. In the **Server SMTP Port** field, enter the port that your email server uses. Common email account server ports:

- a. GMail – 465
- b. OptOnline – 25
- c. Yahoo – 465

08. If your email server requires SSL, select the checkbox to the right of the **Server Requires SSL** label. Common email account servers:

- a. GMail – Yes
- b. OptOnline – No
- c. Yahoo – Yes

09. In the **Server User ID** field, enter the ID of the email account.

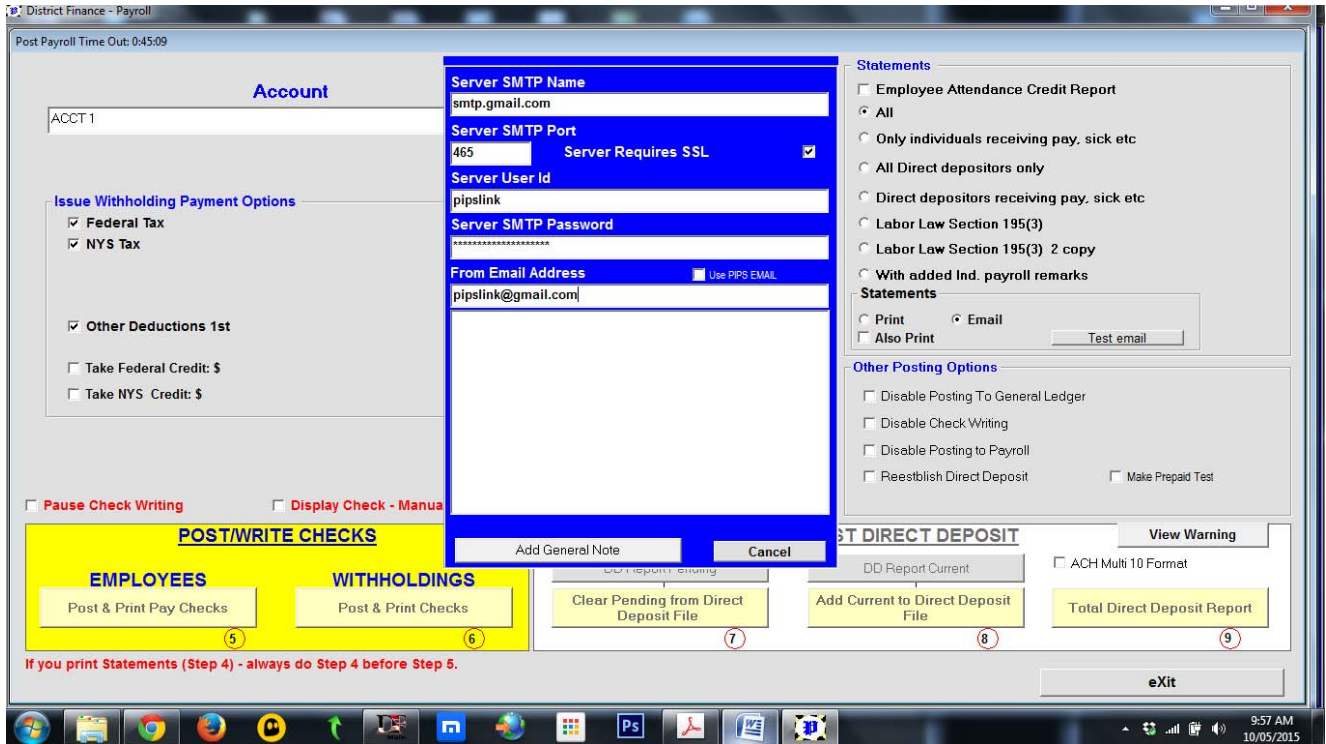
10. In the **Server SMTP Password** field, enter the password of the email account.

11. In the **From Email Address**, enter the email address from which the emails will be sent.

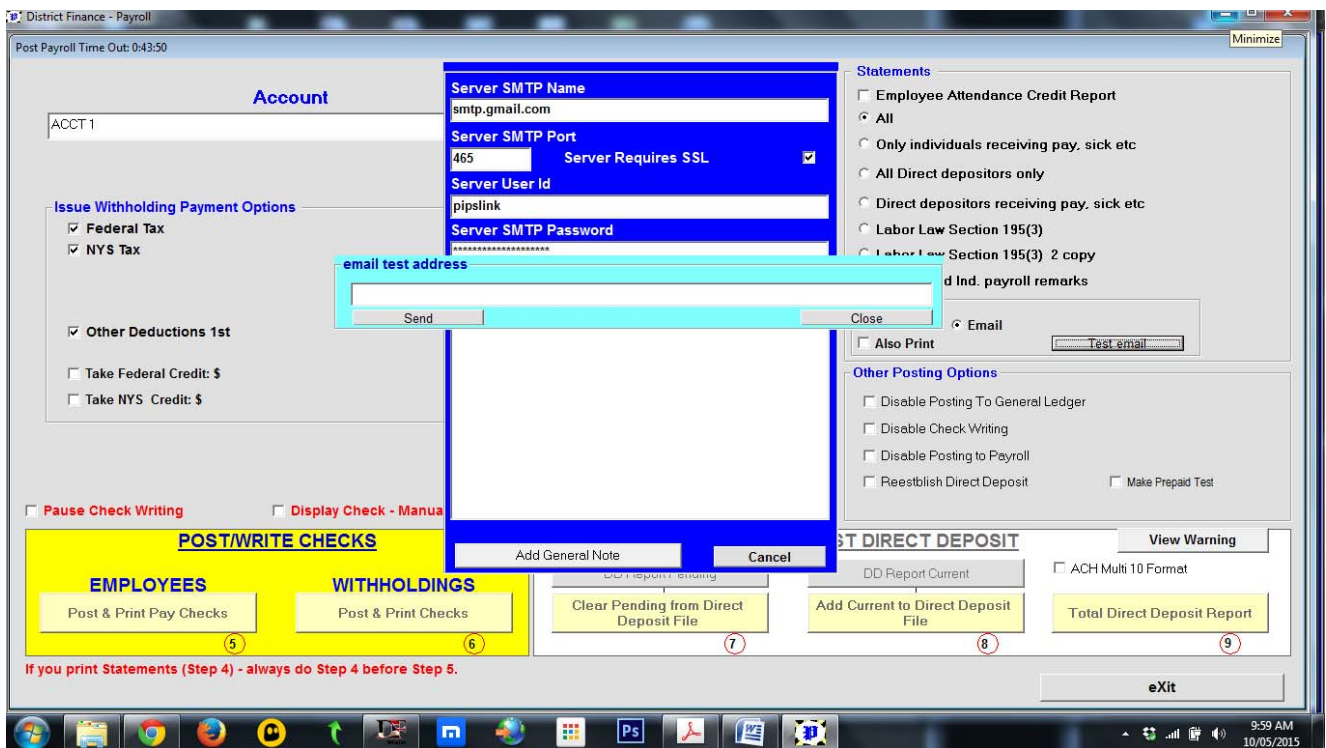
*** Please note that this address must be the same account for which the above information has been entered. ***

***Please note that you have the option to select **“Use PIPS Email”** which is a backup account in the event that your credentials are not working or due to other firewall-related issues. In order to use this option, you must enter pipsfiredistricts@gmail.com ***

12. When all of the fields are populated, the menu should appear similar to the image seen below:



13. Click on the *Test email* button. The following prompt will appear:



14. Enter the email address to whom you wish to send the test email.

15. Click on the **Send** button.

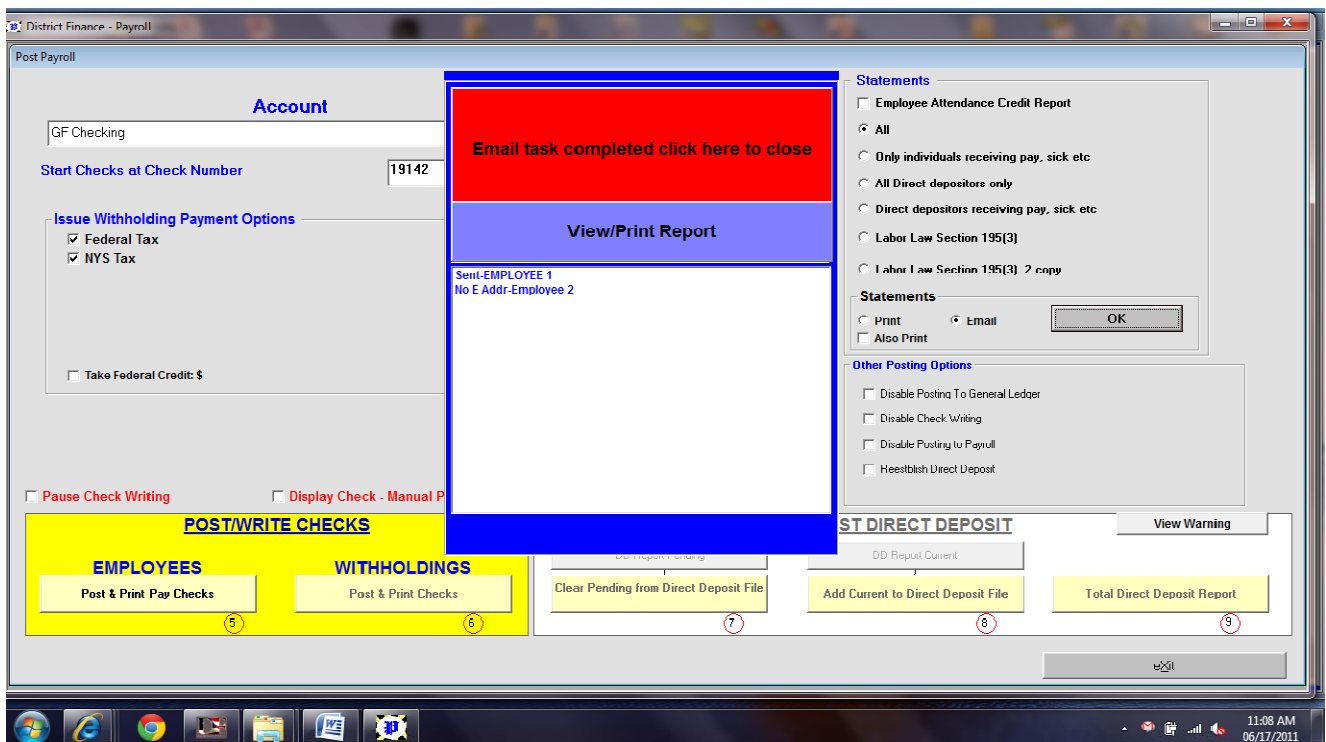
***Please note that if there is an error in the specs that have been entered, an error message will appear. If a message appears telling you that the email has been sent, the specs have been entered properly. Should the email not reach the intended recipient in the latter event, please try "Use PIPS Email." If the email still does not reach the intended recipient, please consult with your network/IT company in order to troubleshoot any firewall or similar issues. ***

Emailing statements during the Post Payroll process:

01. Follow all normal payroll procedures until you get to the printing Statements part of the process.
02. Click on the **Email** radio button.
03. If you would like to print out paper copies of the Statements as well as emailing them, select the "Also Print" checkbox.
04. Click on the **OK** button to the right of the **Email** option to begin emailing the Statements. Once this process has started, the large field below the **Password** will begin to show the status/activity of the emailing/printing.

*** Please note that should an email be entered incorrectly or other internet connectivity issues, the activity log will note that there was an error and the Statement for the individual(s) will be printed instead. ***

05. Once all of the Statements have been emailed/printed, the menu will look as follows:



*** Please note that in the above example Employee 1 has an email address in the system but Employee 2 does not. ***

06. At this point you have two options:

a. *Exit* the email menu by clicking on the large red button or

b. *Viewing/Printing* the Email Status report by clicking on the large blue button labeled as such. After ***Viewing/Printing*** the report you would then perform the first option to continue ***Posting Payroll***.